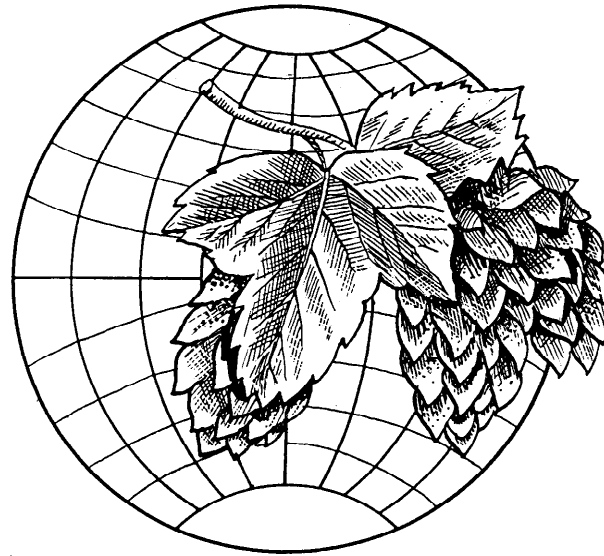


INTERNATIONAL HOP GROWERS' CONVENTION



ECONOMIC COMMISSION - SUMMARY REPORTS

YAKIMA, USA
AUGUST, 2017



International Hop Growers' Convention

IHGC - Economic Commission Summary Reports

Yakima, USA - August, 1, 2017

Country	Hop Acreage 2016 (Hectares, Ha)					Hop Production 2016 (in MT = 1.000 kg)				Alpha acid Prod. MT	Hop Acreage 2017 (Hectares, Ha) estimations					Hop Production 2017 (in MT = 1.000 kg) estimations				Alpha acid Prod. MT
	Aroma	Alpha	Hop area ¹	New	Total	Aroma	Alpha	Total	Aroma		Alpha	Hop area ¹	New	Total	Aroma	Alpha	Total	MT		
Australia*	100	446	546	0	546	205	900	1 105	145	100	446	546	85	631	238	1 200	1 438	211		
Austria	187	58	245	4	249	365	114	479	41	192	58	250	6	256	300	110	410	32		
Belgium	89	60	149	4	149	107	91	198	15	114	54	169	20	169	137	87	234	18		
China [°]	200	1 800	2 000	0	2 000	300	4 200	4 500	300	200	1 800	2 000	0	2 000	300	4 200	4 500	300		
Czech Republic	4 381	46	4 427	348	4 775	7 610	102	7 712	341	4 583	46	4 629	316	4 945	5 615	85	5 700	210		
France	381	33	414	45	459	700	72	772	25	401	36	437	44	481	681	74	755	23		
Germany	10 063	7 254	17 317	1 281	18 598	22 214	20 552	42 766	4 775	10 492	7 574	18 066	1 477	19 543	17 180	16 100	33 280	3 500		
New Zealand	360	52	412	0	412	679	115	794	75	371	71	442	30	442	620	140	760	72		
Poland	602	797	1 398	76	1 475	1 117	1 926	3 044	262	632	843	1 475	140	1 615	800	1 700	2 500	169		
Romania	68	192	260	10	270	57	138	195	20	73	192	265	5	270	66	153	219	21		
Russia	220	200	420	0	420	200	244	444	35	220	200	420	50	470	250	250	500	40		
Serbia [°]	34	33	67	12	79	58	76	134	11	34	33	67	12	79	58	76	134	11		
Slovakia	137	0	137	0	137	187	0	187	7	137	0	137	0	137	160	0	160	6		
Slovenia	1 312	23	1 335	149	1 484	2 400	76	2 476	135	1 400	20	1 420	170	1 590	2 430	70	2 500	135		
South Africa	7	406	413	0	413	17	848	865	100	20	390	410	14	424	45	665	710	85		
Spain	0	536	536	0	536	0	946	946	111	0	537	537	1	537	0	662	662	80		
Ukraine [°]	309	60	369	0	369	400	80	480	30	309	60	369	0	369	400	80	480	30		
UK-England	713	206	919	0	919	1 000	400	1 400	110	770	210	980	61	980	1 000	400	1 400	110		
USA	17 119	4 314	21 433	3 126	21 433	29 421	10 785	40 206	4 005	18 809	4 150	22 959	1 526	22 959	31 975	10 790	42 765	4 680		
IHGC	36 282	16 516	52 797	5 055	54 723	67 037	41 665	108 703	10 543	38 857	16 720	55 578	3 957	57 897	62 255	36 842	99 107	9 733		

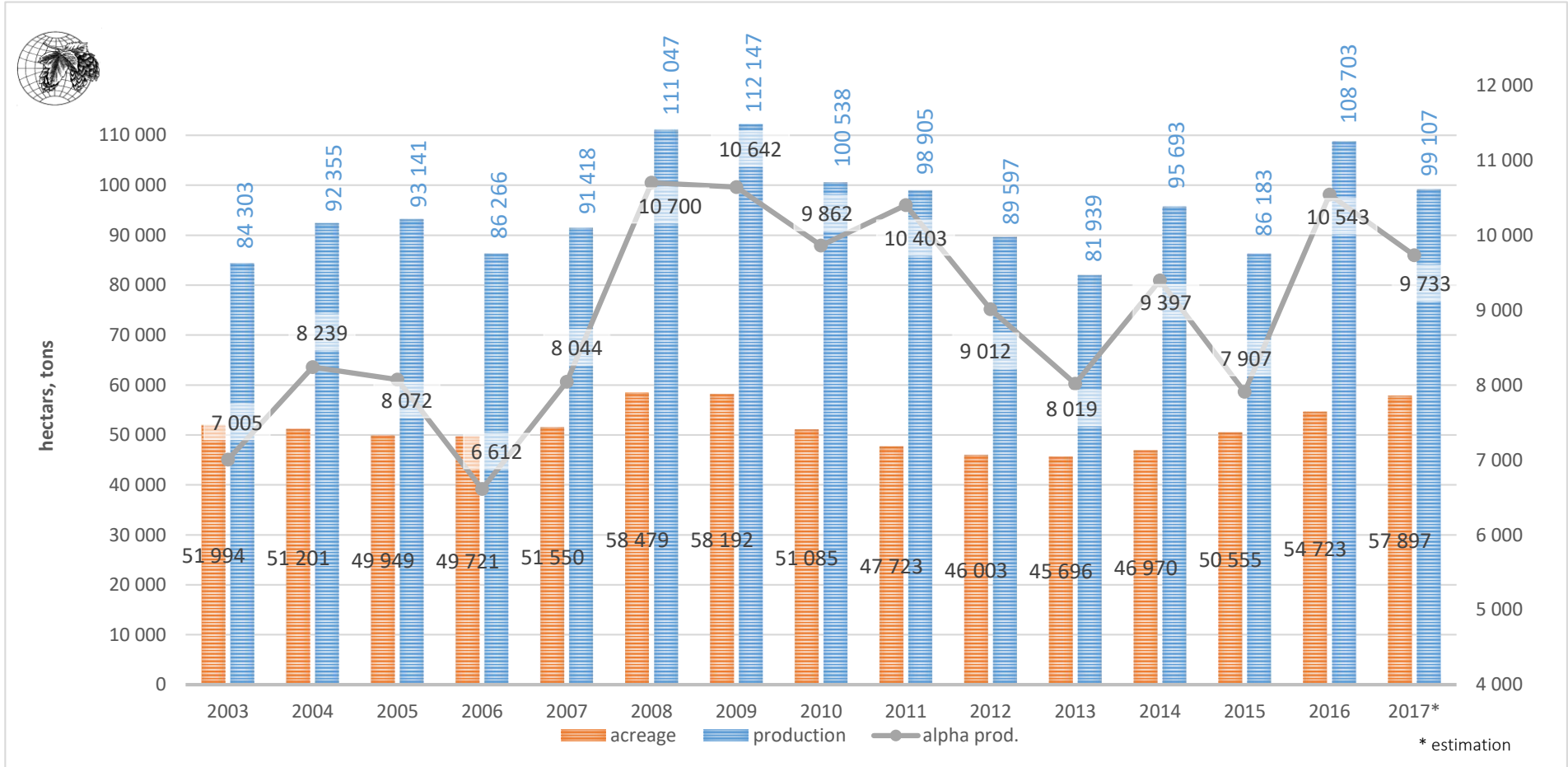
[°] Since no country updates were available, figures from Washington, DC in 2017 were used.

¹ Acreage without new hop areas

* IHGC estimation

Difference Σ 2017-2016 2 575 204 2 781 -1 098 3 174 -4 782 -4 823 -9 596 -810

Figure 1: Comparison of IHGC crops 2003 - 2017* (acreage, production, alpha acids production)



International Hop Growers' Convention

IHGC-Economic Committee: August 2017 - Yakima, WA, USA

Country:

Austria

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	23,4	6,4	18,0	6,0	-5,4	-23,0
Alpha	17,1	15,0	14,3	13,0	-2,8	-16,4
Total	40,5		32,3			

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons	430	400	330	320	200	
% Crop / Year N	100	95	80	75	50	

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops		0	0	0
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops		8,1			
Alpha Hops		9			
Average Price					
Contract Prices					
Aroma Hops	6,5	7,3	7,2	-1,4	Erzeugerpreis / kg RH
Alpha Hops	7,2	7,7	7,5	-2,6	Erzeugerpreis / kg RH
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date: 14.07.2017

Member Organization:

International Hop Growers' Convention

IHGC-Economic Committee: August 2017 - Yakima, WA, USA

Country: Belgium

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma			5,0	5,0		
Alpha			13,0	11,5		
Total						

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons						
% Crop / Year N	60%	60%	40%	40%	40%	40%

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Too less water and high temperatures in June till mid-July
 Increased demand from Belgian breweries for fine aroma varieties, cultivated in Belgium.
 Demand for old Belgium varieties

Country, Date: 20.07.2017

Member Organization(s): Joris Cambie

International Hop Growers' Convention

IHGC-Economic Committee: August 2017 - Yakima, WA, USA

Country: Czech Republic

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	331,0		200,0		-131,0	-39,6
Alpha	10,0		10,0		0,0	0,0
Total	341,0		210,0		-131,0	-38,4

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons						
% Crop / Year N	100	100	100	95	90	85

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				0

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops	6,8	7,3			farmer price
Alpha Hops	4,5	5			farmer price
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:
20.07.2017

Member Organization(s):
Hop Growers Union of the Czech Rep.

International Hop Growers' Convention

IHGC-Economic Committee: August 2017 - Yakima, WA, USA

Country:

France

Hop Area (Ha = Hectares)	Year N-1 2016	Year N 2017	Difference N - (N-1)	Difference %
Aroma	381	401	20	5,2%
Alpha	33	36	3	7,7%
Total	414	437	23	5,5%

New Hop Area (Ha)	Year N-1	Year N
Aroma	42	41
Alpha	3	3
Total	45	44

TOTAL Hop Area (Ha)	Year N-1	Year N	Difference N - (N-1)	Difference %
Aroma	423	442	18	4,4%
Alpha	36	39	3	8,3%
Total	459	481	22	4,8%

Production MT=Metric Tons	Year N-1 0	Year N (estimate)	Difference N - (N-1)	Difference %
Aroma	700	681	-19	-2,7%
Alpha	72	74	2	2,8%
Total	772	755	-17	-2,2%

Yield MT/Ha	Year N-1 0	Year N (estimate)	Difference %
Aroma	1,8	1,6	0,9
Alpha	2,2	2,0	0,9
Total	1,9	1,7	0,9

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
Aroma						
Strisselspalt	187	181	-6	2,00		
Aramis	48,5	53	4,5	5,80		
Tradition	31	28,3	-2,7	4,80		
Triskel	22	39	17	3,50		
Fuggle	44,3	48,5	4,2	4,60		
Golding	44,6	45	0,4	3,50		
Challenger	5,7	6	0,3	6,30		
Barbe-Rouge	9,5	10,6	1,1	6,00		
Mistral	7	7	0	5,50		
Cascade	2	4,5	2,5			
Alpha						
Columbus	5,6	4,3	-1,3	10,00		
Brewers Gold	15	16	1	5,50		
Nugget	6,3	7,1	0,8	10,00		
Magnum	4,7	4,7	0	12,00		
Target	5,9	5,7	-0,2	10,50		

International Hop Growers' Convention

IHGC-Economic Committee: August 2017 - Yakima, WA, USA

Country:

France

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	2017	%		%
Aroma	17,2	3,2			-17,2	0,0
Alpha	7,8	7,4			-7,8	0,0
Total	25,0	3,9			-25,0	0,0

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons						
% Crop / Year N	95	90	80	70	50	50

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production		700	72	772
- Sold Production		680	72	752
= Unsold Hops		10	0	20
% unsold Hops		1,43	0,00	2,59

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:
July 7th 2017

Member Organization(s):
AGPH
Francis Heitz

International Hop Growers' Convention

IHGC-Economic Committee: August 2017 - Yakima, WA, USA

Country:
Germany

Hop area (ha)	Year N-1 2016	Year N 2017	Difference N - (N-1)	Difference %
Aroma	10063	10492	429	4,3
Alpha	7254	7574	320	4,4
Total	17317	18066	749	4,3

New Hop Area (ha)	Year N-1 2016	Year N 2017
Aroma	471	583
Alpha	810	894
Total	1281	1477

TOTAL Hop area (ha)	Year N-1 2016	Year N 2017	Difference N - (N-1)	Difference %
Aroma	10534	11075	541	5,1
Alpha	8064	8468	404	5,0
Total	18598	19543	945	5,1

Production MT	Year N-1 2016	Year N 2017 estimate	Difference N - (N-1)	Difference %
Aroma	22 214	17 180	-5 034	-22,7
Alpha	20 552	16 100	-4 452	-21,7
Total	42 766	33 280	-9 486	-22,2

Yield MT/HA.	Year N-1 2016	Year N 2017 estimate	Difference %
Aroma	2,1	1,6	-26,4
Alpha	2,5	1,9	-25,4
Total	2,3	1,7	-25,9

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
Aroma						
Perle	3093	2966	-127	8,2	7,7	-0,5
Hall.Tradition	2827	2704	-123	6,4	6,3	-0,1
Hersbrucker	943	915	-28	2,8	2,9	0,1
Hallertauer	733	723	-10	4,3	4	-0,3
Tettnanger	732	747	15	3,8	3,8	0
Spalter Select	534	532	-2	5,2	4,9	-0,3
Saphir	450	473	23	4	4,1	0,1
Spalter	119	121	2	4,3	3,8	-0,5
Mand. Bavaria	346	356	10	8,7	7,8	-0,9
Alpha						
Herkules	4884	5797	913	17,3	16,8	-0,5
Hall. Magnum	2196	2011	-185	14,3	13,8	-0,5
Hall.Taurus	357	284	-73	17,6	16,6	-1
North. Brewer	266	300	34	10,5	9,3	-1,2
Nugget	152	131	-21	12,9	11,4	-1,5
Polaris	106	174	68	21,3	19,4	-1,9
Hall. Merkur	21	17	-4	13,4	13,4	0
Brewers Gold	17	16	-1	7,2	7,2	0
Comet	7	8	1			0

International Hop Growers' Convention

IHGC-Economic Commission: August 2017 -Yakima, USA

Country:

Germany

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	estimate	%		%
Aroma	1420,0	6,4	1000,0	5,8	-420,0	-0,6
Alpha	3355,0	16,3	2500,0	15,5	-855,0	-0,8
Total	4 775	11,2	3500,0	10,5	-1275,0	-0,6

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric Tons	38142	40637	38877	37516	27691	25181
% Crop / Year N	115	122	117	113	83	76

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production		22 214	20 552	42 766
- Sold Production		22 214	20 552	42 766
= Unsold Hops		0,00	0,00	0,00
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% Diff. 2016 vs. 2015	Kind of Price
Spot Prices					
<i>Aroma Hops</i>	9,09	6,57		-27,70	Farmer Price
<i>Alpha Hops</i>	5,48	6,59		20,30	Farmer Price
<i>Average Price</i>	6,5	6,58		1,20	Farmer Price
Contract Prices					
<i>Aroma Hops</i>	4,92	5,36		8,90	Farmer Price
<i>Alpha Hops</i>	3,74	4,39		17,40	Farmer Price
<i>Average Price</i>	4,34	4,88		12,40	Farmer Price
Average Prices					
<i>Aroma Hops</i>	5,15	5,6		8,70	Farmer Price
<i>Alpha Hops</i>	3,97	4,8		20,90	Farmer Price
AVERAGE	5,54	5,21		-6,00	Farmer Price

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:

Germany

25.07.2017

Verband deutscher Hopfenpflanzer

gez. Brunner

International Hop Growers' Convention

IHGC-Economic Committee: August 2017 - Yakima, WA, USA

Country: New Zealand

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total						

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

A decrease in production is seen due to a less than optimum growing season and in some instances performance of baby plants in new ground.
A very wet spring and unseasonably cool summer meant that many plants did not develop to their potential. An increase in volume next season is expected as more plantings come on line
Market conditions remain favourable for New Zealand varieties.

Country, Date:

Member Organization(s):

International Hop Growers' Convention

IHGC-Economic Committee: August 2017 - Yakima, WA, USA

Country:

Poland

Hop Area (Ha = Hectares)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	602	632	30,19	5,0
Alpha	797	843	46,49	5,8
Total	1398	1475	76,68	5,5

New Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)
Aroma	30	25
Alpha	46	115
Total	76	140

TOTAL Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	632	657	25,31	4,0
Alpha	843	958	115,19	13,7
Total	1475	1615	140,50	9,5

Production MT=Metric Tons	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	1117	800	-317	-28,4
Alpha	1926	1700	-226	-11,8
Total	3044	2500	-544	-17,9

Yield MT/Ha	Year N-1 2016	Year N 2017 (estimate)	Difference %
Aroma	1,9	1,2	-34,4
Alpha	2,4	1,8	-26,6
Total	2,2	1,5	-28,9

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
Aroma						
Lubelski	414,93	425,00	10,07	3,10		
Perle	49,08	45,00	-4,08	6,20		
Sybilla	84,78	105,00	20,22	5,80		
Hallertauer Traditi	73,06	73,00	-0,06	5,50		
Other	9,84	9,00	-0,84			
Alpha						
Marynka	273,00	280,00	7,00	7,30		
Magnum	493,96	500,00	6,04	12,30		
Magnat	61,71	150,00	88,29	13,20		
Other	14,14	28,00	13,86			

International Hop Growers' Convention

IHGC-Economic Committee: August 2017 - Yakima, WA, USA

Country:

Poland

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	47,37	4,24	28,00	3,50	-19,37	-0,74
Alpha	214,60	11,14	170,00	10,00	-44,60	-1,14
Total	262,05	8,61	168,75	6,75	-93,30	-1,86

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons	1 850					
% Crop / Year N	75					

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production		1117,26	1926,35	3043,61
- Sold Production		1117,26	1926,35	3043,61
= Unsold Hops		0	0	0
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops	7,00	7,00			
Alpha Hops	4,65	4,65			
Average Price	5,83	5,83			
Contract Prices					
Aroma Hops	4,47	5,27			
Alpha Hops	3,54	4,31			
Average Price	4,01	4,79			
Average Prices					
Aroma Hops	5,74	6,14			
Alpha Hops	4,10	4,48			
AVERAGE	4,92	5,31			

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Prices per kg of hops may vary due to currency stock changes.
Estimated data may vary from real situation.

Source: Barth - Haas Report, Ministry of Agriculture

Country, Date: Poland, 15th July 2017

Member Organization(s):
Import - Export J.A.Szałas ZPPCh

International Hop Growers' Convention

IHGC-Economic Committee: August 2017 - Yakima, WA, USA

Country: Romania

Hop Area (Ha = Hectares)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	68	73	5	7,4
Alpha	192	192	0	0
Total	260	265	5	1,9

New Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)
Aroma	5	5
Alpha	5	0
Total	10	5

TOTAL Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	73	78	5	6,8
Alpha	197	192	-5	-2,5
Total	270	270	0	0,0

Production MT=Metric Tons	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	57	66	9	15,8
Alpha	138	153	15	10,9
Total	195	219	24	12,3

Yield MT/Ha	Year N-1 2016	Year N 2017 (estimate)	Difference %
Aroma	0,84	0,90	7,9
Alpha	0,72	0,80	10,9
Total	0,75	0,83	10,2

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
Aroma						
Perle	43	43	0	9,2	8,7	-0,5
Huller Bitter	30	30	0	7,8	7,6	-0,2
Tradition		5	5	0	7,5	7,5
	73	78	5			
Alpha						
Magnum	93	93	0	12,2	12,0	-0,2
Merkur	29	24	-5	12,5	12,5	0,0
Brewers Gold	70	70	0	8,1	7,7	-0,4
	192	197	-5			

International Hop Growers' Convention

IHGC-Economic Committee: August 2017 - Yakima, WA, USA

Country: Romania

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	5,1	8,9	5,3	8,0	0,2	3,9
Alpha	15,0	10,9	15,7	10,3	0,7	4,7
Total	20,1	10,3	21,0	9,6	0,9	4,5

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons	200	270	290	290	300	300
% Crop / Year N	98	81	90	100	100	100

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production		57	138	195
- Sold Production		57	138	195
= Unsold Hops		0	0	0
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:
17 July 2017

Member Organization(s):
MORA ACATIU ERVIN

International Hop Growers' Convention

IHGC-Economic Committee: August 2017 - Yakima, WA, USA

Country: Slovakia

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	<i>(estimate)</i>	%		%
Aroma						
Alpha						
Total						

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons	130					
% Crop / Year N	81					

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops		7	7		
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date: Menšík

Member Organization(s):

International Hop Growers' Convention

IHGC-Economic Committee: August 2017 - Yakima, WA, USA

Country: Slovenia

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total	135,0					

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons						
% Crop / Year N	85	85	70	60	60	60

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production				2 476
- Sold Production				2 476
= Unsold Hops				
% unsold Hops				0

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price		7.5			
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price		5.2			
Average Prices	4.5 - 6.0				
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Hop market encouraged growers to enlarge their acreage with Styrian aroma and flavor hops. Areas with new hops in Slovenia include varieties Aurora, Styrian golding and domestic flavour hops - such as Styrian Wolf and Styrian Cardinal. End of May a hailstorm with a strong rain damaged hops in the Savinja Valley, early July also in the area of Polskava. Styrian hops from Slovenia - a good choice for global craft beers.

Country, Date:
Slovenia, July 14, 2017

Member Organization(s):
Hop Growers of Slovenia /
Hmezad exim / Inbarco

International Hop Growers' Convention

IHGC-Economic Committee: August 2017 - Yakima, WA, USA

Country:

South Africa

Hop Area (Ha = Hectares)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma				
Alpha				
Total				

New Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)
Aroma		14
Alpha		
Total		

TOTAL Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	7	34		
Alpha	406	390		
Total	413	424	11	

Production MT=Metric Tons	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	17	45	28	167,1
Alpha	848	665	-183	-21,6
Total	865	710	-155	-17,9

Yield MT/Ha	Year N-1 2016	Year N 2017 (estimate)	Difference %
Aroma	2,5	1,3	-46,4
Alpha	2,1	1,7	-18,3
Total	2,1	1,7	-20,1

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
Aroma						
Southern Aroma	0,5	3,1	2,6		4,6	
Southern Passion	3	11,1	8,1		11,0	
African Queen	3,4	20,2	16,8		12,0	
Alpha						
Southern Dawn	38,2	38,2	0		12,0	
Southern Promise	103,1	98,4	-4,7		10,6	
Southern Star	251	251,8	0,8		14,1	
U1/108	0,7	0,7	0		11,4	
N1/69	0,3	0,3	0		10,0	
Southern Brewer	1,7	0,2	-1,5		8,4	

International Hop Growers' Convention

IHGC-Economic Committee: August 2017 - Yakima, WA, USA

Country:

South Africa

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma			0,5			
Alpha			84,7			
Total			85,2			

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons						
% Crop / Year N						

We grow for a brewer so this is not applicable (not just yet)

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:

Member Organization(s): Hop Farms

International Hop Growers' Convention

IHGC-Economic Committee: August 2017 - Yakima, WA, USA

Country: Spain

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha	110,7					
Total	110,7					

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons	1 100	1 100				
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices	3,54	4,7			
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:

Member Organization(s):
LÚPULOS DE LEON SAT

International Hop Growers' Convention

IHGC-Economic Committee: August 2017 - Yakima, WA, USA

Country:

UK

Hop Area (Ha = Hectares)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	713	770	57	
Alpha	206	210	4	
Total	919	980	61	

New Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)
Aroma		
Alpha		
Total		

TOTAL Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	713	770		
Alpha	206	210		
Total	919	980		

Production MT=Metric Tons	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma				
Alpha				
Total	1 400	1 400		

Yield MT/Ha	Year N-1 2016	Year N 2017 (estimate)	Difference %
Aroma			
Alpha			
Total	1,5	1,4	

Main Varieties (Ha = Hectares)	Year N-1 Total Hectares	Year N Total Hectares	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
Aroma						
E K Goldings	94	100		5,99		
Goldings	132	140		5,91		
First Gold	97	100		9,19		
Fuggles	90	85		5,32		
Challenger	53	53		8,36		
Progress	59	67		6,86		
Sovereign	55	57		6,20		
Alpha						
Admiral	29	27		15,51		
Target	80	75		11,98		
Pilgrim	68	72		10,45		
Northdown	15	18		8,02		

International Hop Growers' Convention

IHGC-Economic Committee: August 2017 - Yakima, WA, USA

Country: UK

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total	110,0		110,0			

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2016	2017	2018	2019	2020	2021
Metric tons						
% Crop / Year N	100	90	90	60	30	10

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				-
% unsold Hops				-

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2016	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

No unsold hops in stock

Country, Date:

Member Organization(s):

International Hop Growers' Convention

IHGC-Economic Committee: August 2017 - Yakima, WA, USA

Country:

USA

Hop Area (Ha = Hectares)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	17 119	18 809	1 690	9,9%
Alpha	4 314	4 150	-164	-3,8%
Total	21 433	22 959	1 526	7,1%

New Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)
Aroma		
Alpha		
Total		

TOTAL Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	17 119	18 809	1 690	9,9%
Alpha	4 314	4 150	-164	-3,8%
Total	21 433	22 959	1 526	7,1%

Includes 1011 ha outside of Pacific Northwest

Production MT=Metric Tons	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	29 421	31 975	2 554	8,7%
Alpha	10 785	10 790	5	0,0%
Total	40 206	42 765	2 559	6,4%

Yield MT/Ha	Year N-1 2016	Year N 2017 (estimate)	Difference %	Pounds/Acre
Aroma	1,72	1,70		1 517
Alpha	2,50	2,60		2 320
Total	1,88	1,86		1 662

Individual Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
Aroma/Dual				9,0%	9,2%	
Azacca™, ADHA-483	203	232	29			
Cascade*	3 067	3 010	-57			
Centennial*	2 160	2 160	0			
Citra®, HBC 394	1 818	2 138	320			
Chinook	850	1 020	170			
El Dorado	270	267	-3			
Mosaic™, HBC 369	1 100	1 122	22			
Simcoe®, YCR 14	1 752	1 821	69			
Willamette	650	671	21			

*Total other (non-PNW) acreage estimated at 1011 ha. Cascade, Centennial and Chinook include estimates representing a contribution from those additional states.

Alpha	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
Alpha				13,3%	14,2%	
Apollo™	392	375	-17			
Bravo™	293	255	-38			
CTZ	1 304	2 004	700			
Nugget	666	592	-74			
Summit™	716	654	-62			
Super Galena™	153	200	47			

International Hop Growers' Convention

IHGC-Economic Committee: August 2017 - Yakima, WA, USA

Country: USA

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total	4 005	10,1	4 680	10,6		

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons						
% Crop / Year N	98	95	64	40	25	25

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE	US\$4.38/lb	US\$5.72/lb			
	8.88 Euro/kg	11.60 Euro/kg			

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Exchange rate \$1 USD = 0.92 Euro (24 MAR 2017)

Alpha and aroma variety totals are based on the IHGC list of World Hop Varieties. Those varieties classified as "Dual" are included in the Aroma category for consistency. Varieties listed in the "Other" category in the US statistical reports produced by USDA-NASS are included in Aroma. This insures that Dual purpose and Other varieties are classified consistently throughout the year. The USDA statistical reporting system is voluntary, and individual varieties are not reported if three or fewer growers have the variety in each state. Alpha percentages are reported as 10% lower than spectro levels, to be more consistent with EBC results.

Country, Date:
USA

VII.17

Member Organization(s):
Hop Growers of America

North American Hop Acreage Estimate			July 1, 2017	
2017 June Strung for Harvest				
Prepared by Hop Growers of America				
Contact Ann George, 509-453-4749, info@usahops.org				
STATE/PROVINCE & VARIETY	ACRES STRUNG FOR HARVEST			2016-17
	2016 ac	2017 ac	2017 ha	% +/-
ARIZONA	1,0	1,0	0,4	0,00%
CALIFORNIA	130,0	130,0	52,6	0,00%
COLORADO	200,0	200,0	80,9	0,00%
CONNECTICUT	15,0	15,0	6,1	0,00%
IDAHO #				
Apollo™	235,0	236,0	95,5	0,43%
Bravo™	151,0	154,0	62,3	1,99%
Calypso™	81,0	81,0	32,8	0,00%
Cascade	788,0	886,0	358,5	12,44%
Centennial	*	223,0	90,2	
Chinook	418,0	733,0	296,6	75,36%
Citra®, HBC 394	576,0	758,0	306,7	31,60%
Crystal	123,0	177,0	71,6	
El Dorado®	227,0	214,0	86,6	-5,73%
Mosaic®, HBC 369	496,0	500,0	202,3	0,81%
Simcoe®, YCR 14	232,0	401,0	162,3	72,84%
Super Galena™	69,0	*	*	
Zeus	580,0	1 031,0	417,2	77,76%
Experimental	9,0	*	*	
Other Varieties	1 663,0	1 775,0	718,3	6,73%
TOTAL IDAHO #	5 648,0	7 169,0	2 901,1	26,93%
ILLINOIS	30,0	30,0	12,1	0,00%
INDIANA	50,0	50,0	20,2	0,00%
IOWA	40,0	60,0	24,3	50,00%
KENTUCKY	20,0	30,0	12,1	50,00%
MAINE	24,0	24,0	9,7	0,00%
MARYLAND	15,0	15,0	6,1	0,00%
MASSACHUSETTS	25,0	25,0	10,1	0,00%
MICHIGAN	650,0	810,0	327,8	24,62%
MINNESOTA	73,0	120,0	48,6	64,38%
MONTANA	12,0	17,0	6,9	41,67%
NEBRASKA	24,0	39,0	15,8	62,50%
NEW HAMPSHIRE	2,0	2,0	0,8	0,00%
NEW JERSEY	15,0	15,0	6,1	0,00%
NEW YORK	300,0	400,0	161,9	33,33%
NORTH CAROLINA	30,0	30,0	12,1	0,00%
NORTH DAKOTA	2,0	3,5	1,4	75,00%
OHIO	70,0	100,0	40,5	42,86%

STATE/PROVINCE & VARIETY	ACRES STRUNG FOR HARVEST			2016-17
	2016 ac	2017 ac	2017 ha	% +/-
OREGON #				
Cascade	1 211,0	1 125,0	455,3	-7,10%
Centennial	723,0	807,0	326,6	11,62%
Chinook	107,0	150,0	60,7	40,19%
Citra®, HBC 394	654,0	693,0	280,4	5,96%
Crystal	423,0	430,0	174,0	1,65%
Fuggle	141,0	105,0	42,5	-25,53%
Golding	*	*	*	
Liberty	*	217,0	87,8	
Magnum	151,0	*	*	
Mosaic®, HBC 369	*	333,0	134,8	
Mt. Hood	324,0	333,0	134,8	2,78%
Nugget	1 460,0	1 331,0	538,6	-8,84%
Perle	*	73,0	29,5	
Simcoe®, YCR 14	330,0	475,0	192,2	43,94%
Sterling	228,0	227,0	91,9	-0,44%
Super Galena™	*	65,0	26,3	
Tettnanger	122,0	125,0	50,6	2,46%
Willamette	833,0	866,0	350,5	3,96%
Experimental	*	*	*	
Other Varieties	1 058,0	790,0	319,7	-25,33%
TOTAL OREGON #	7 765,0	8 145,0	3 296,1	4,89%
PENNSYLVANIA	15,0	20,0	8,1	33,33%
RHODE ISLAND	10,0	10,0	4,0	0,00%
VERMONT	25,0	25,0	10,1	0,00%
VIRGINIA	30,0	30,0	12,1	0,00%
WASHINGTON #				
Azacca™, ADHA-483	506,0	574,0	232,3	13,44%
Ahtanum™, YCR 1	155,0	330,0	133,5	112,90%
Apollo™	735,0	690,0	279,2	-6,12%
Bravo™	573,0	477,0	193,0	-16,75%
Cascade	5 582,0	5 146,0	2 082,5	-7,81%
Centennial	4 359,0	4 504,0	1 822,7	3,33%
Chinook	1 415,0	1 546,0	625,6	9,26%
Citra®, HBC 394	3 264,0	3 833,0	1 551,1	17,43%
Cluster	623,0	618,0	250,1	-0,80%
Columbus/Tomahawk®, F10	1 416,0	1 413,0	571,8	-0,21%
Comet	163,0	287,0	116,1	76,07%
Crystal	191,0	135,0	54,6	-29,32%
El Dorado®	396,0	446,0	180,5	12,63%
Ekuanot™, HBC 366	*	880,0	356,1	
Eureka!™	*	325,0	131,5	
Galena	262,0	353,0	142,9	34,73%

STATE/PROVINCE & VARIETY	ACRES STRUNG FOR HARVEST			2016-17
	2016 ac	2017 ac	2017 ha	% +/-
Glacier	145,0	*	*	
Jarrylo™, ADHA-881	131,0	*	*	
Golding	*	44,0	17,8	
Loral™, HBC 291	*	186,0	75,3	
Mosaic® HBC 369	2 029,0	1 940,0	785,1	-4,39%
Mt. Hood	88,0	78,0	31,6	-11,36%
Nugget	186,0	131,0	53,0	-29,57%
Palisade®, YCR 4	580,0	521,0	210,8	-10,17%
Simcoe®, YCR 14	3 769,0	3 722,0	1 506,2	-1,25%
Summit™	1 769,0	1 616,0	654,0	-8,65%
Super Galena™	310,0	430,0	174,0	38,71%
Tettnanger	*	38,0	15,4	
Willamette	728,0	791,0	320,1	8,65%
Zeus	2 502,0	2 508,0	1 014,9	0,24%
Experimental	567,0	671,0	271,5	18,34%
Other	5 000,0	4 688,0	1 897,1	-6,24%
TOTAL WASHINGTON #	37 444,0	38 921,0	15 750,5	3,94%
WISCONSIN	297,0	297,0	120,2	0,00%
TOTAL PACIFIC NORTHWEST	50 857,0	54 235,0	21 947,7	6,64%
TOTAL NON-PNW US ACREAGE	2 105,0	2 498,5	1 011,1	18,69%
TOTAL UNITED STATES	52 962,0	56 733,5	22 958,8	7,12%
BRITISH COLUMBIA	79,0	79,0	32,0	0,00%
MANITOBA	5,0	5,0	2,0	0,00%
NEW BRUNSWICK	20,0	20,0	8,1	0,00%
NOVA SCOTIA	15,0	15,0	6,1	0,00%
ONTARIO	90,0	175,0	70,8	94,44%
PRINCE EDWARD ISLAND	7,5	7,5	3,0	0,00%
QUEBEC	123,0	123,0	49,8	0,00%
TOTAL CANADA	339,5	424,5	171,8	25,04%
TOTAL NORTH AMERICA	53 301,5	57 158,0	23 130,6	7,24%
* Withheld by USDA-NASS to avoid disclosing data for individual operations.				
# Figures for WA, OR and ID from USDA-NASS June 2017 Acreage Strung for Harvest Report, released on June 10, 2016. Information for other states/provinces are estimates provided to Hop Growers of America by various sources and include several varieties.				
(-) represents zero				

Figure 2: Australia hop crops 2003 - 2017*

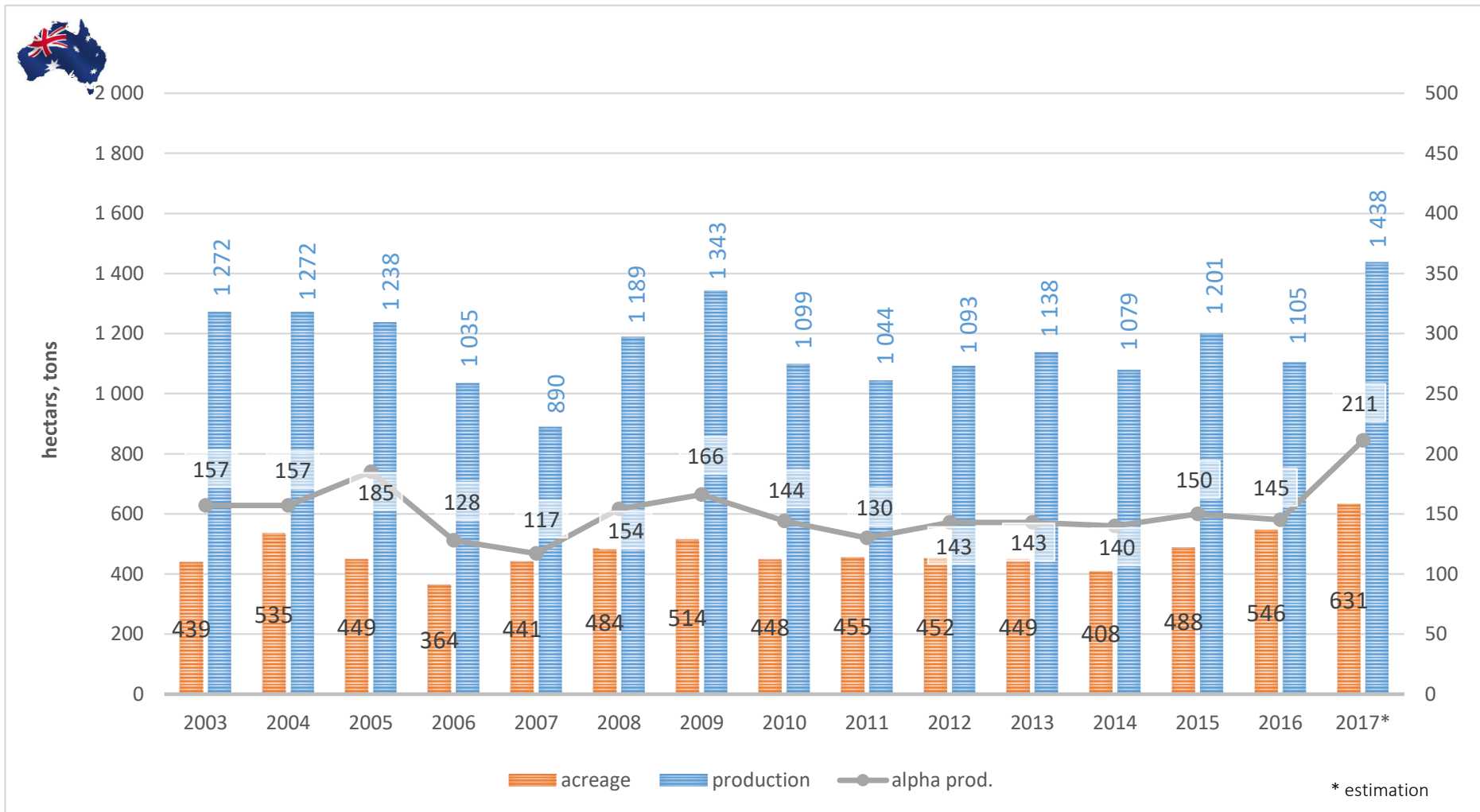


Figure 3: Austria hop crops 2003 - 2017*

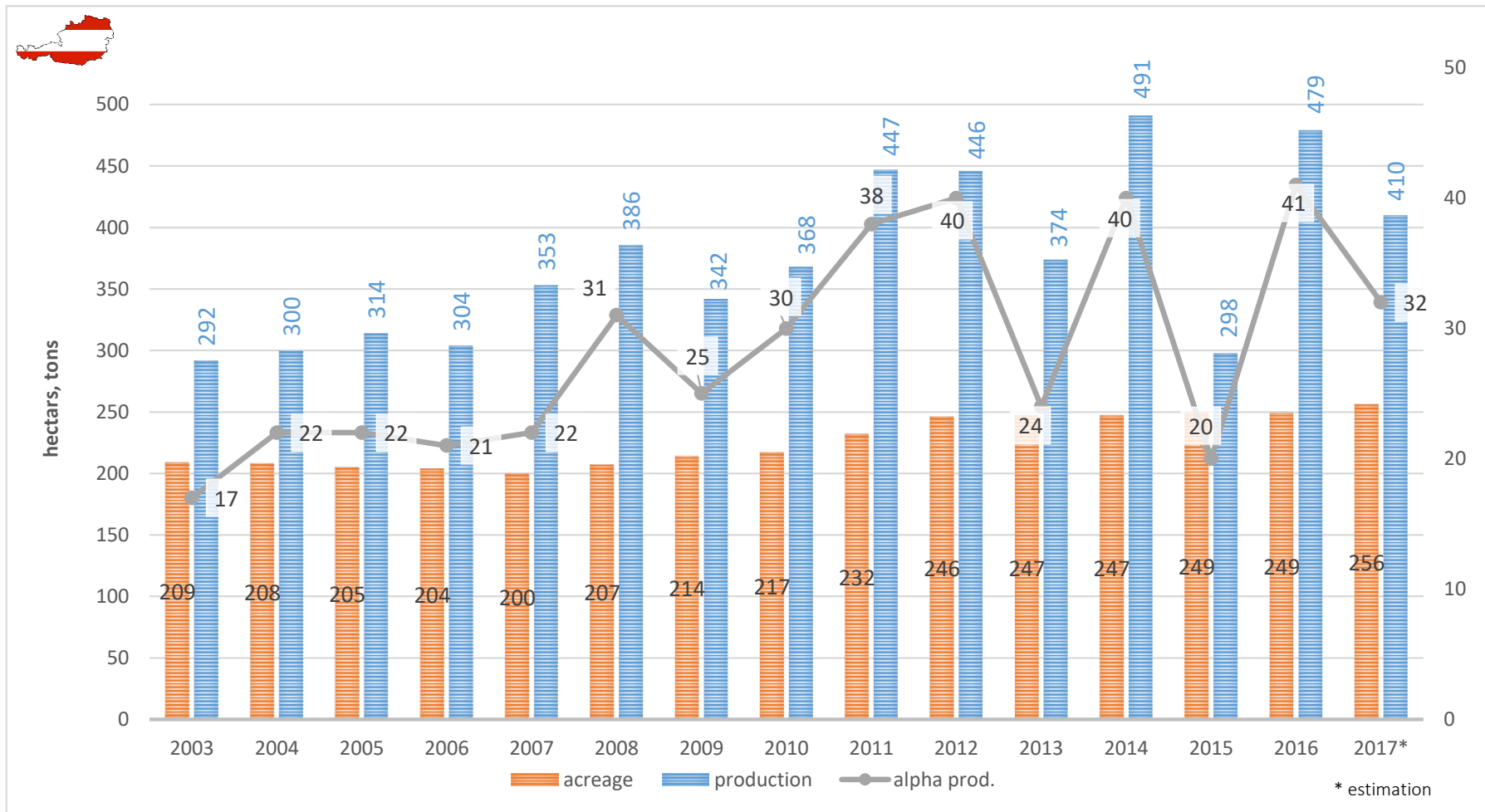


Figure 4: Belgium hop crops 2003 - 2017*

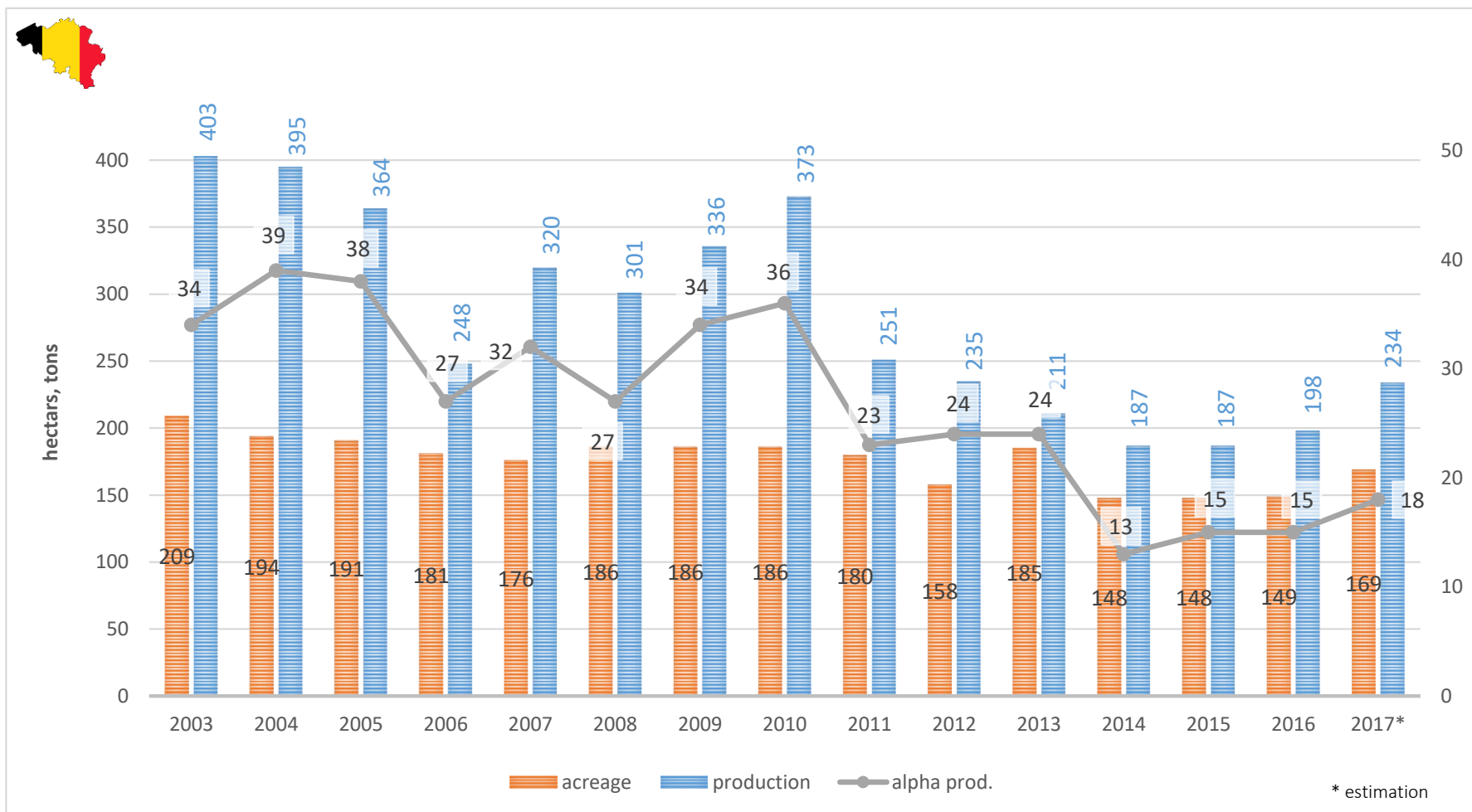


Figure 5: China hop crops 2003 - 2017*

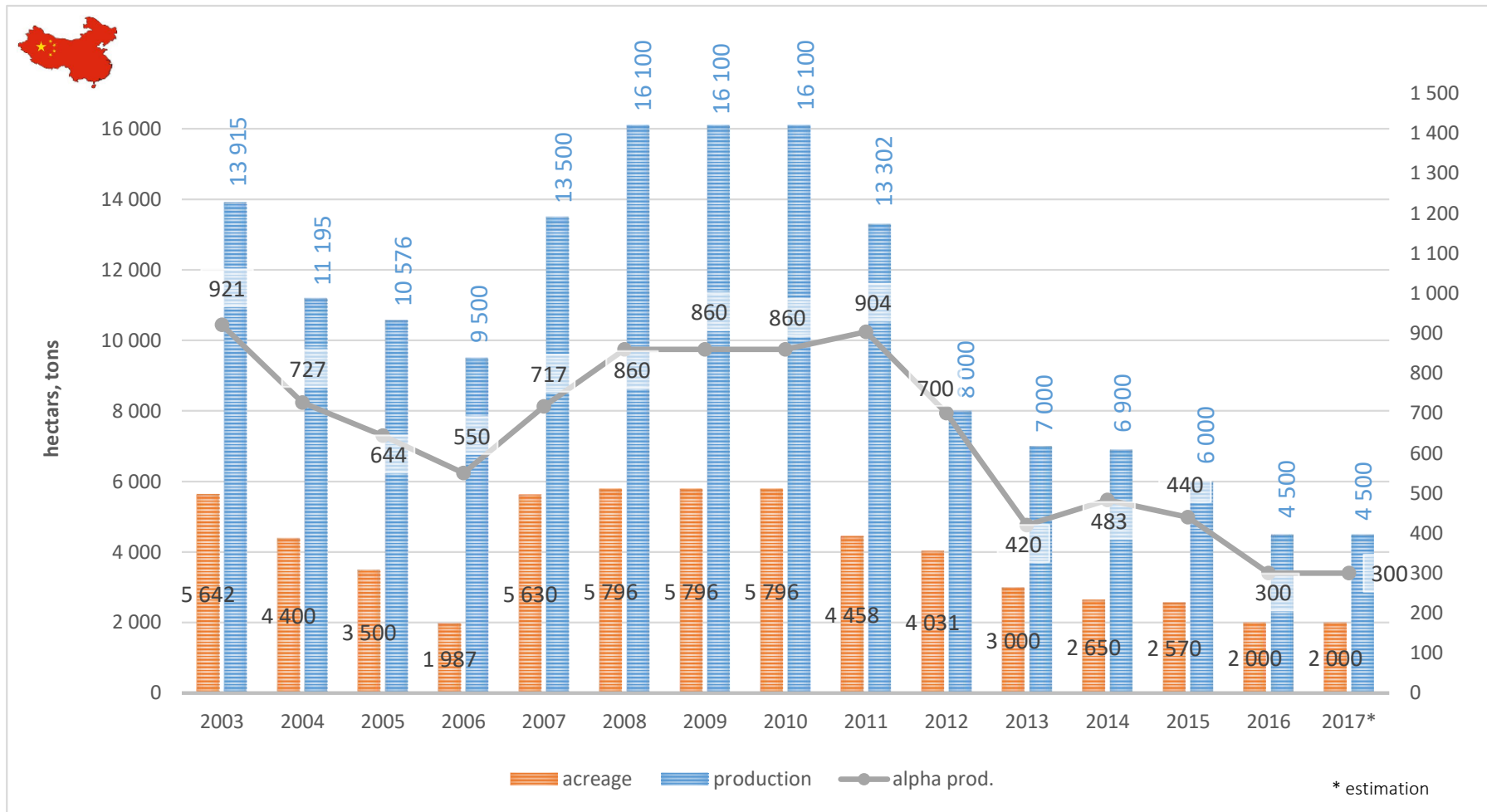


Figure 6: Czech Republic hop crops 2003 - 2017*

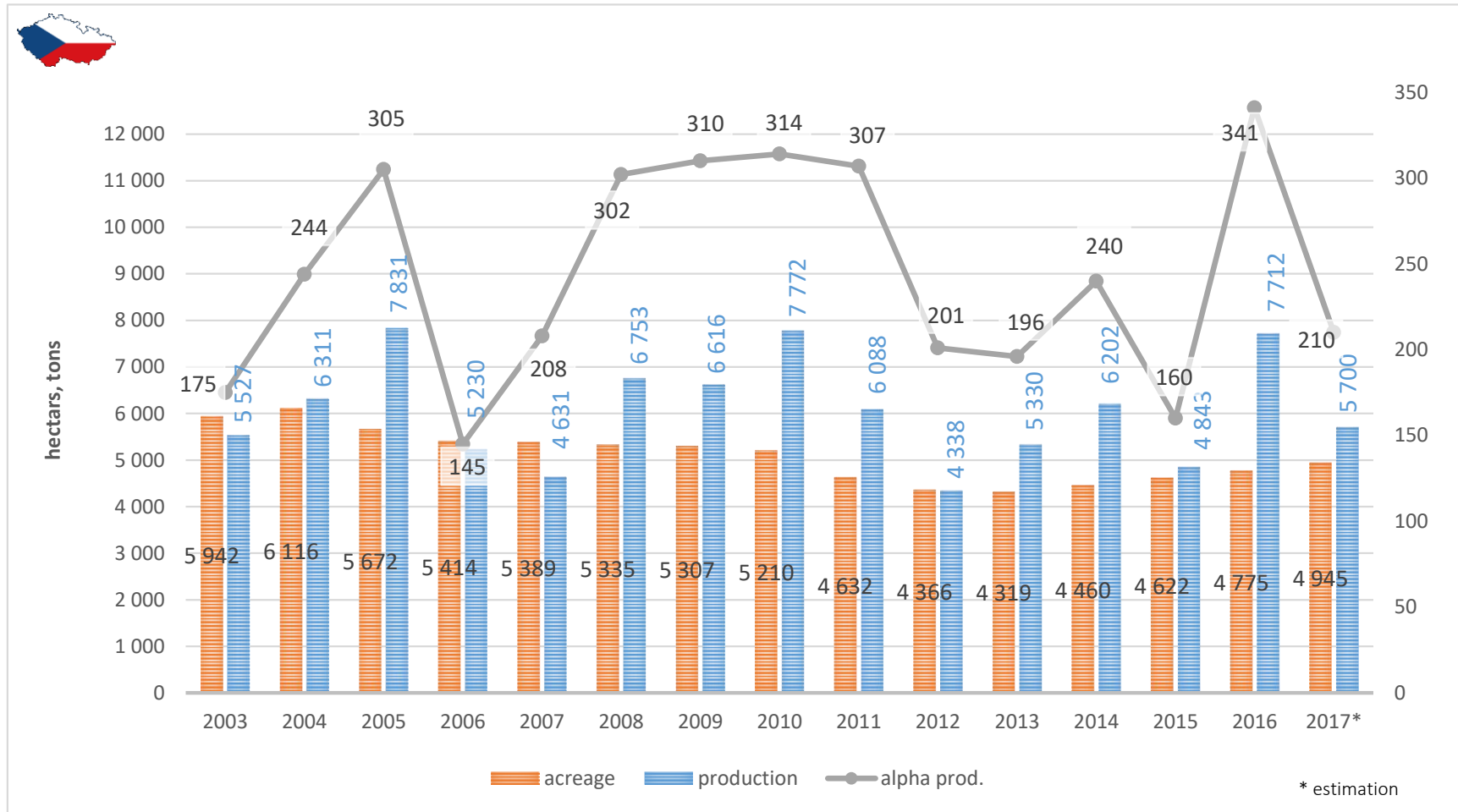


Figure 7: France hop crops 2003 - 2017*

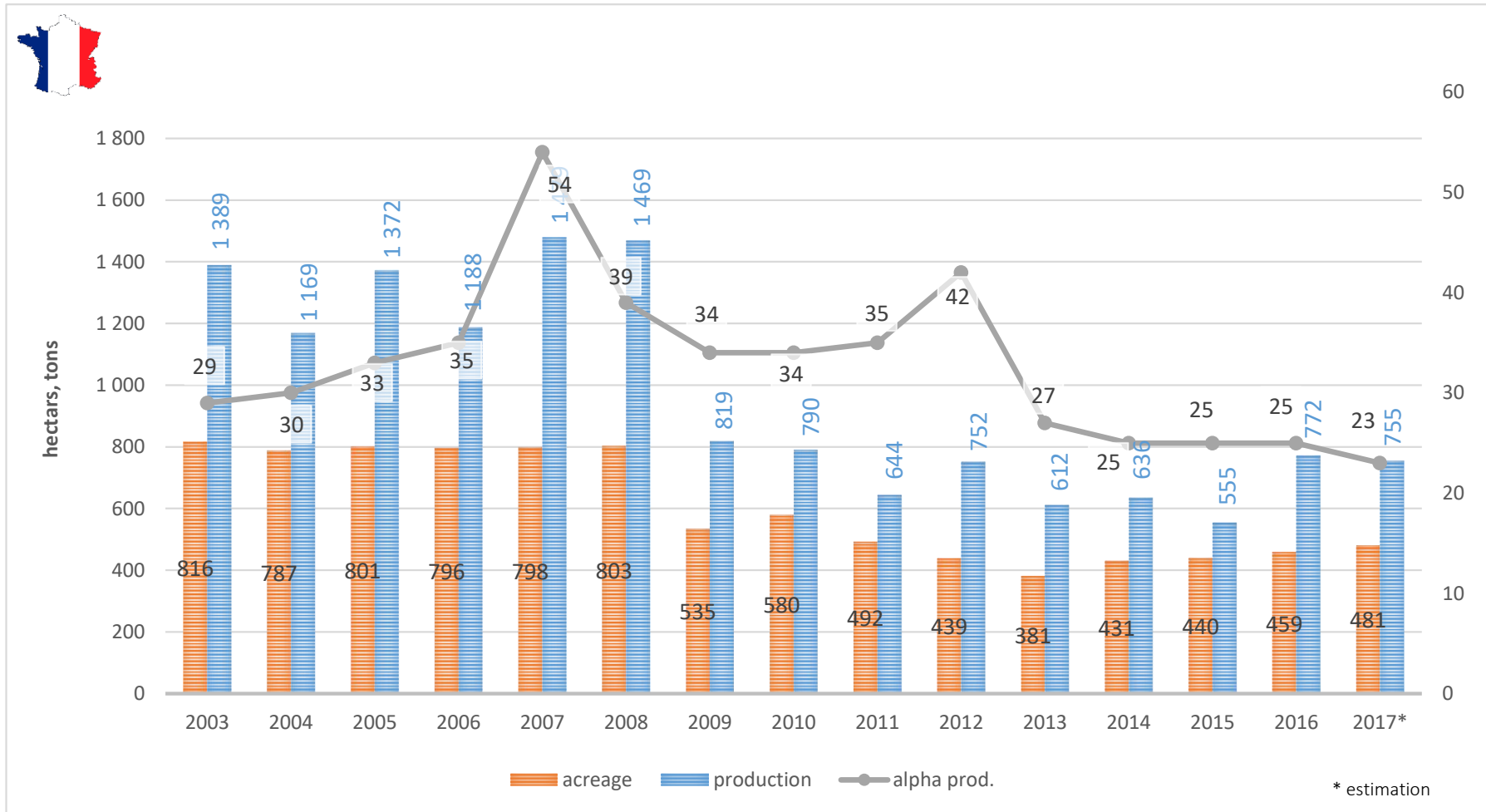


Figure 8: Germany hop crops 2003 - 2017*

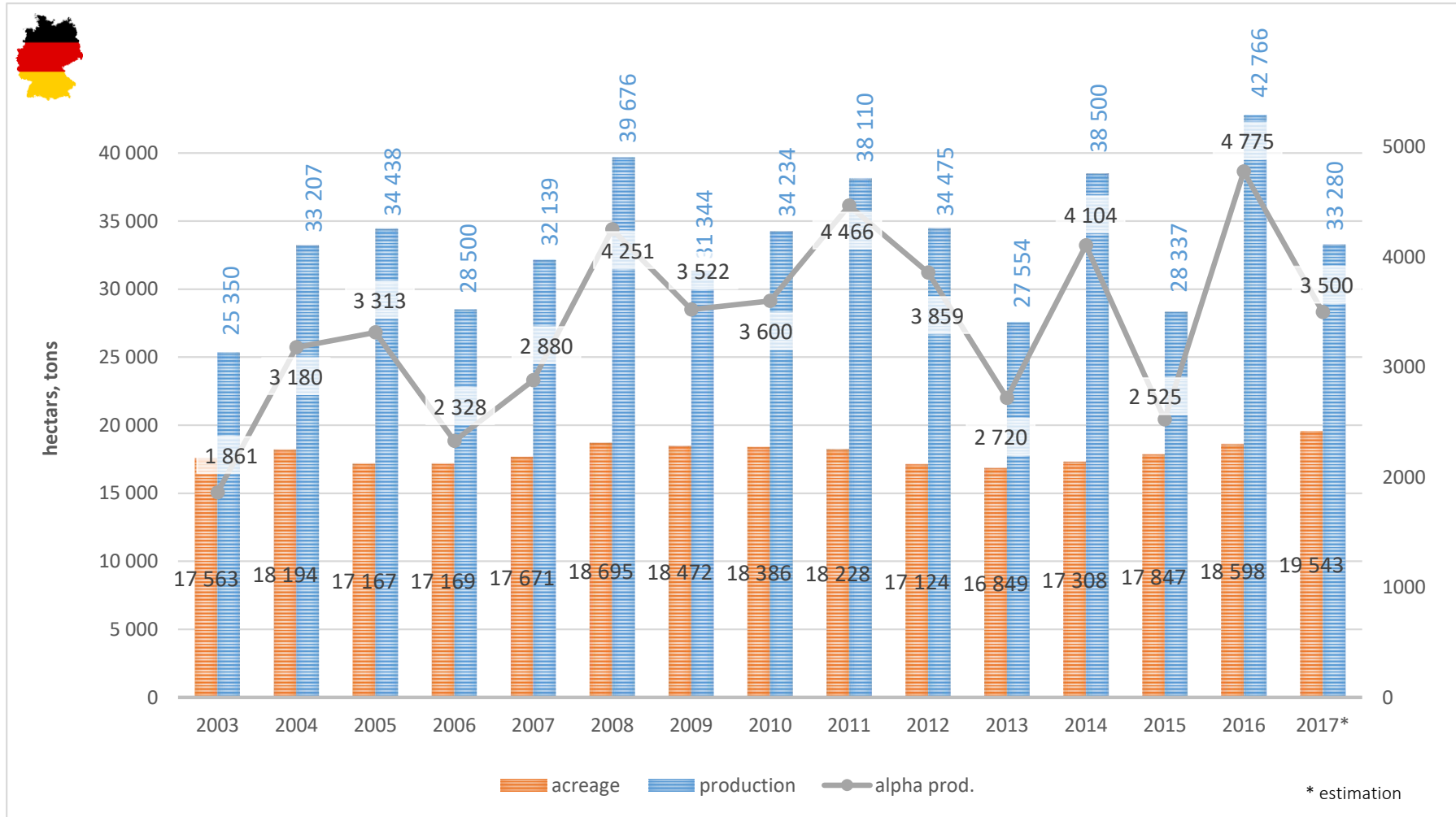


Figure 9: New Zealand hop crops 2003 - 2017

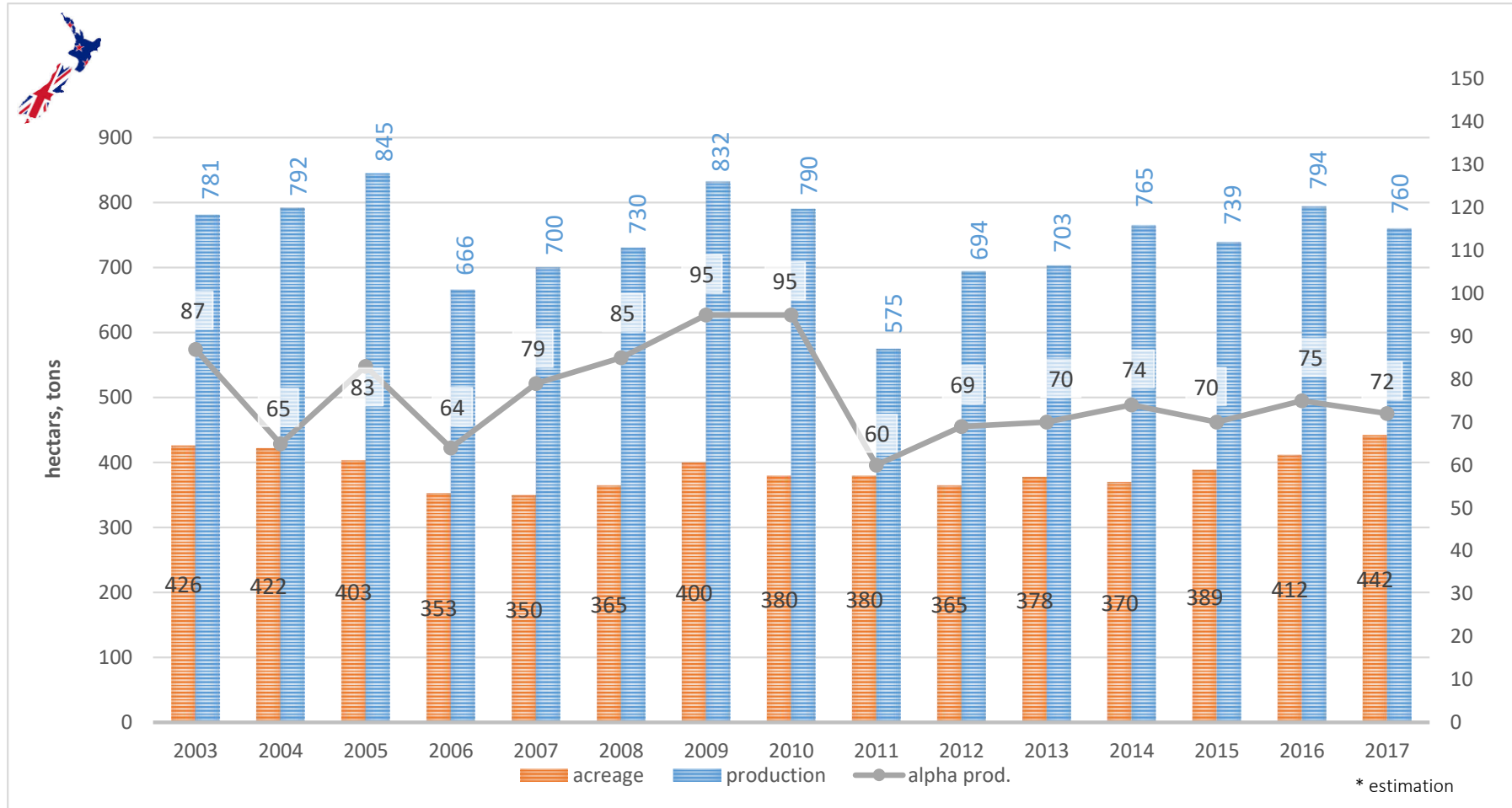


Figure 10: Poland hop crops 2003 - 2017*

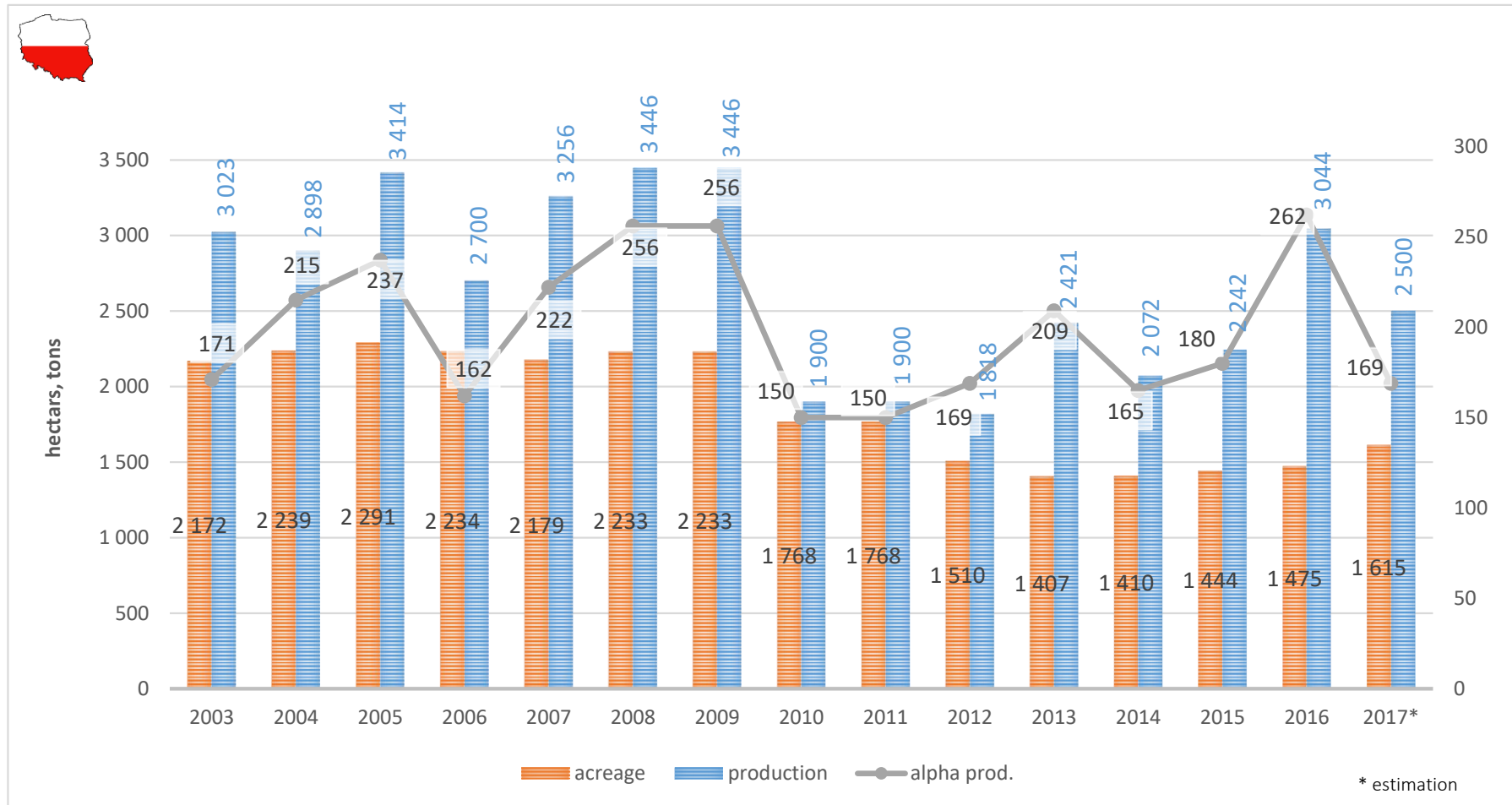


Figure 11: Romania hop crops 2003 - 2017*

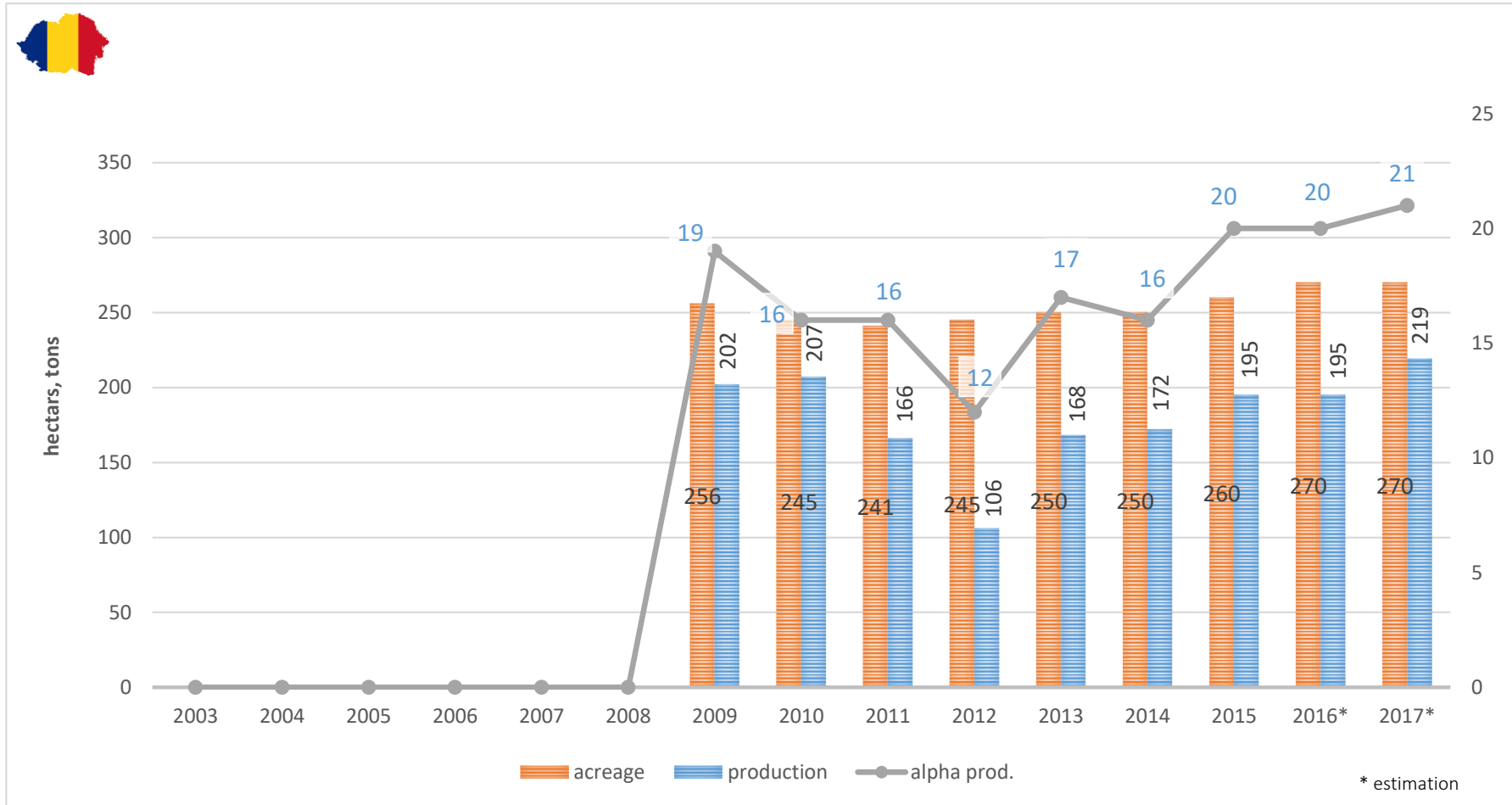


Figure 12: Slovakia hop crops 2003 - 2017*

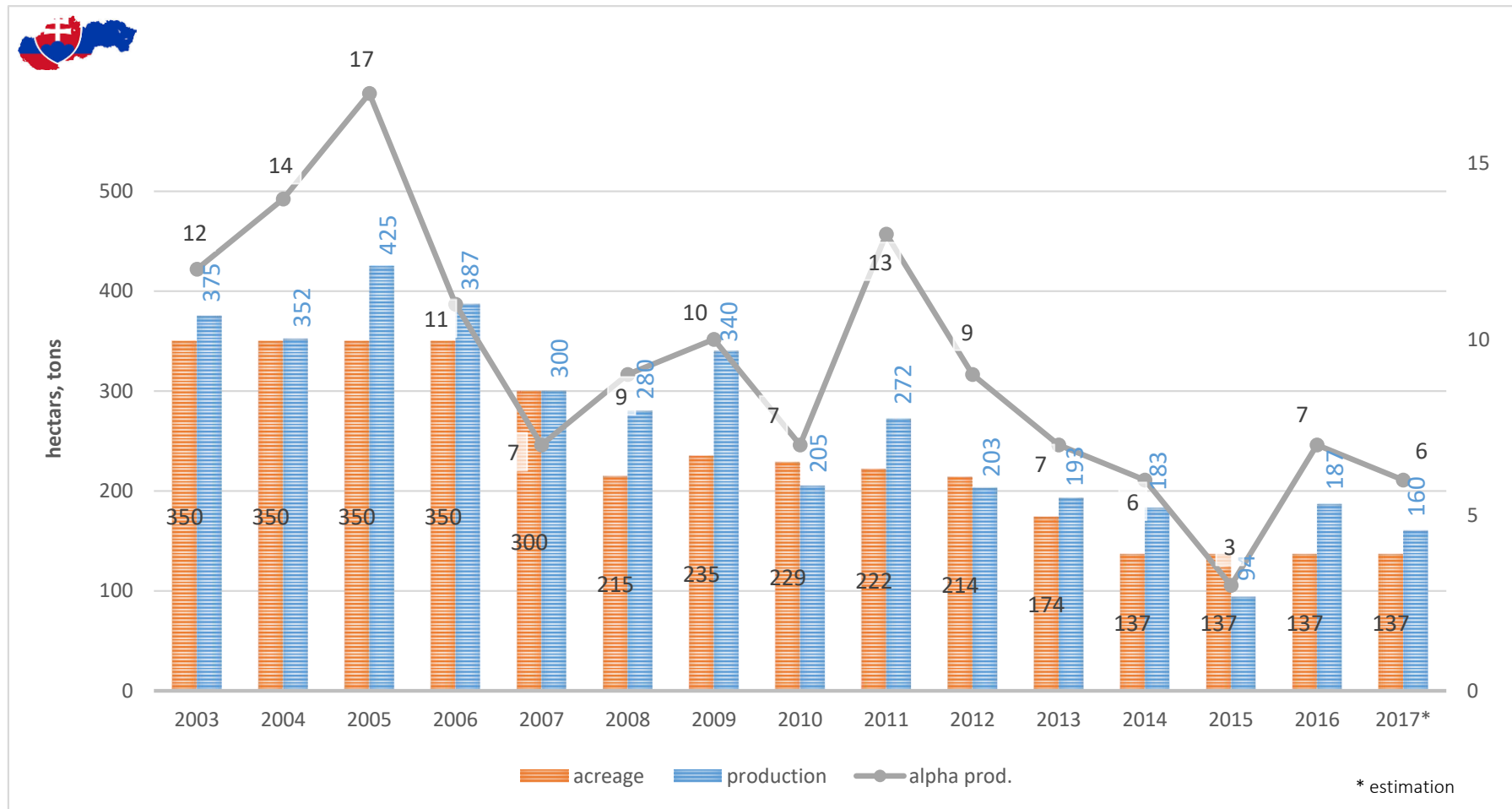


Figure 13: Slovenia hop crops 2003 - 2017*

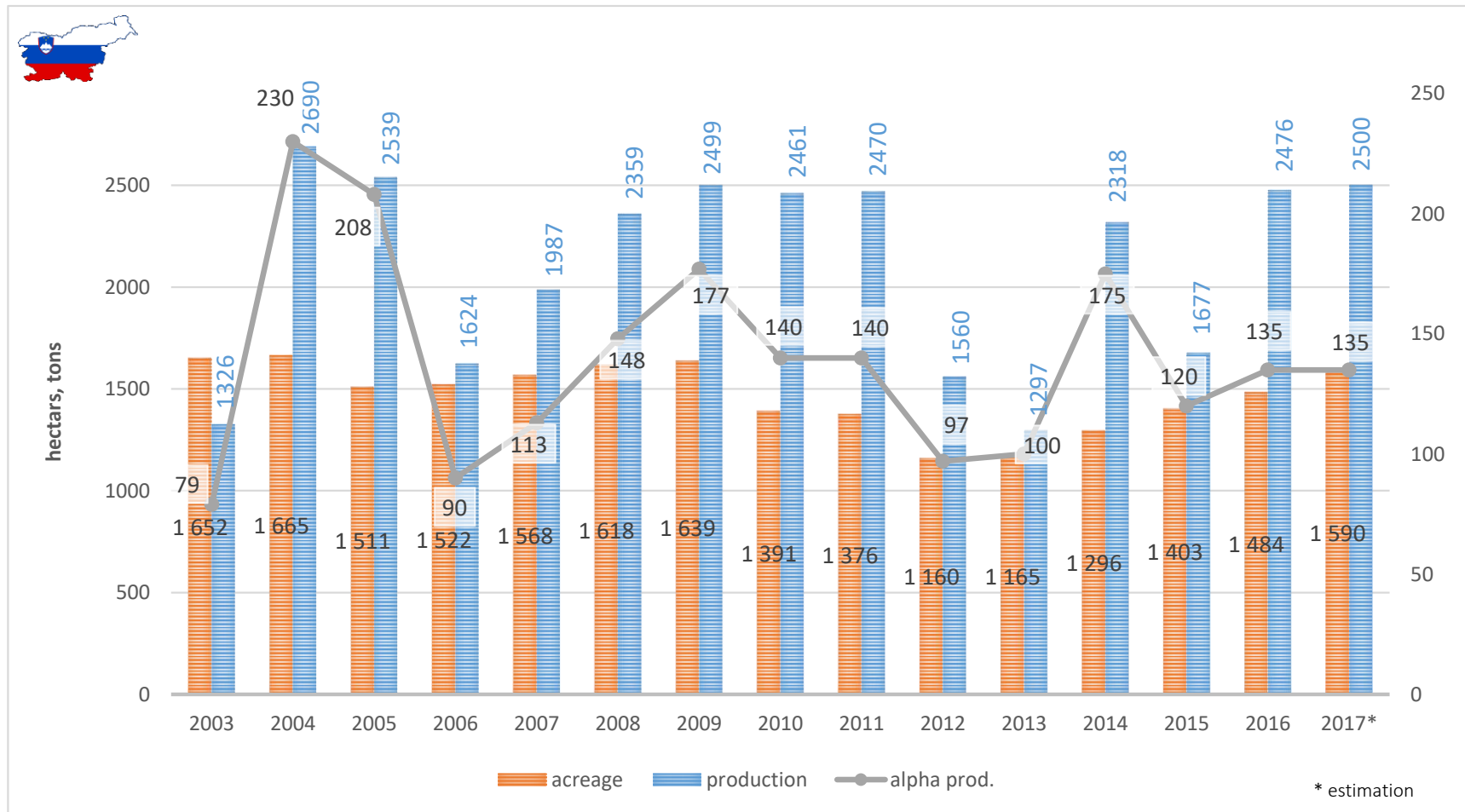


Figure 14: South Africa hop crops 2003 - 2017*

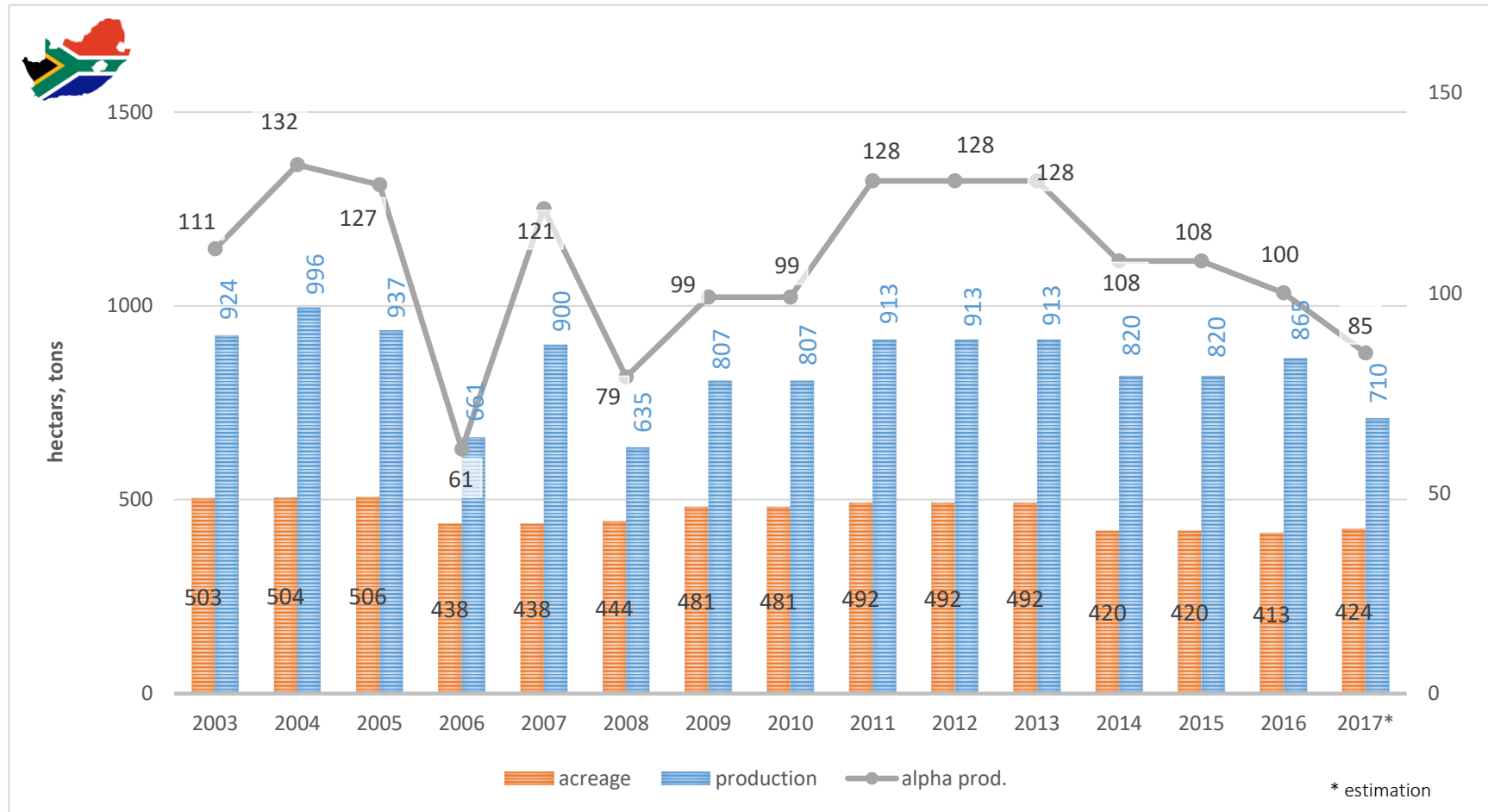


Figure 15: Spain hop crops 2003 - 2017*

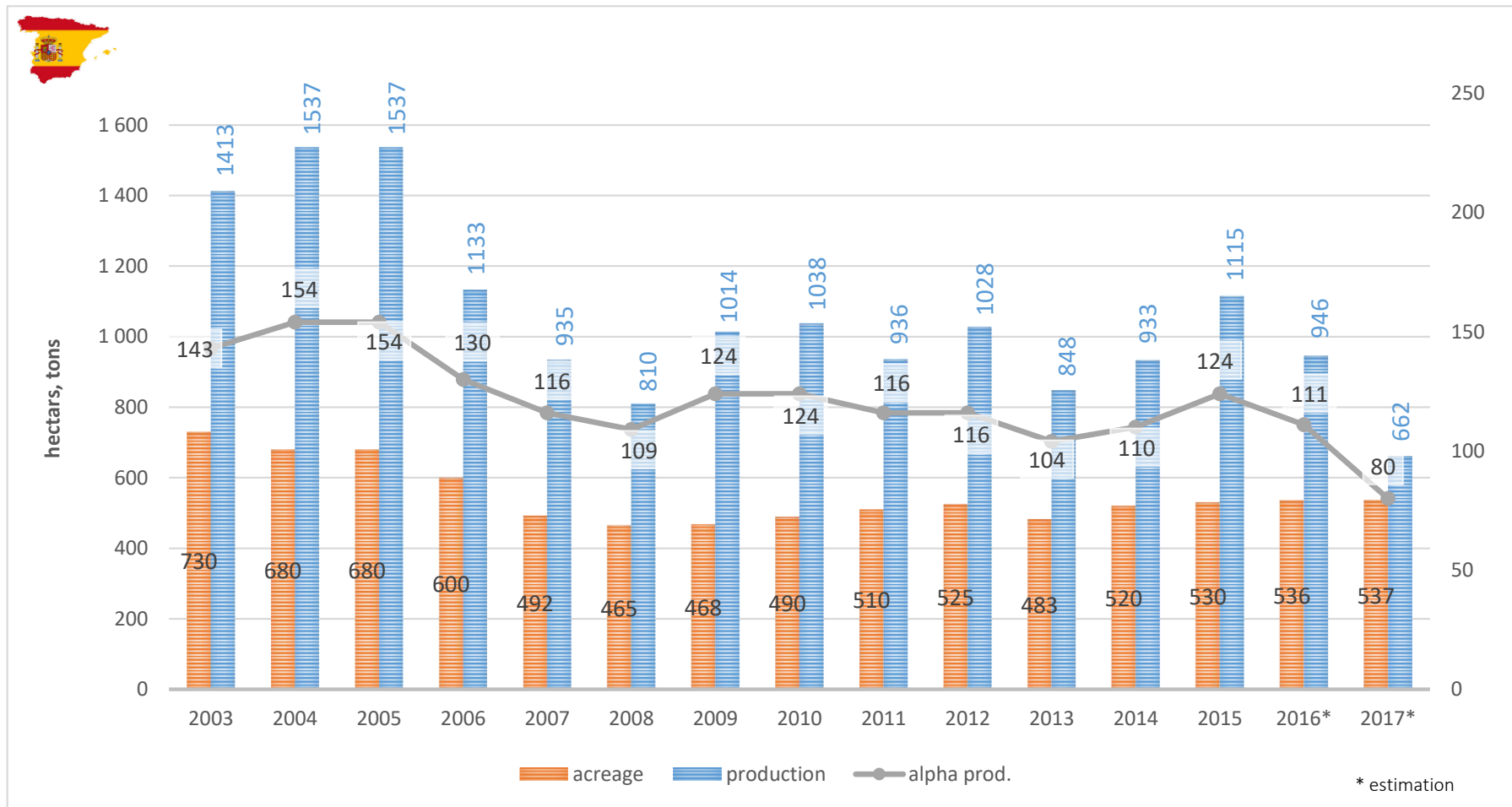


Figure 16: UK-England hop crops 2003 - 2017*

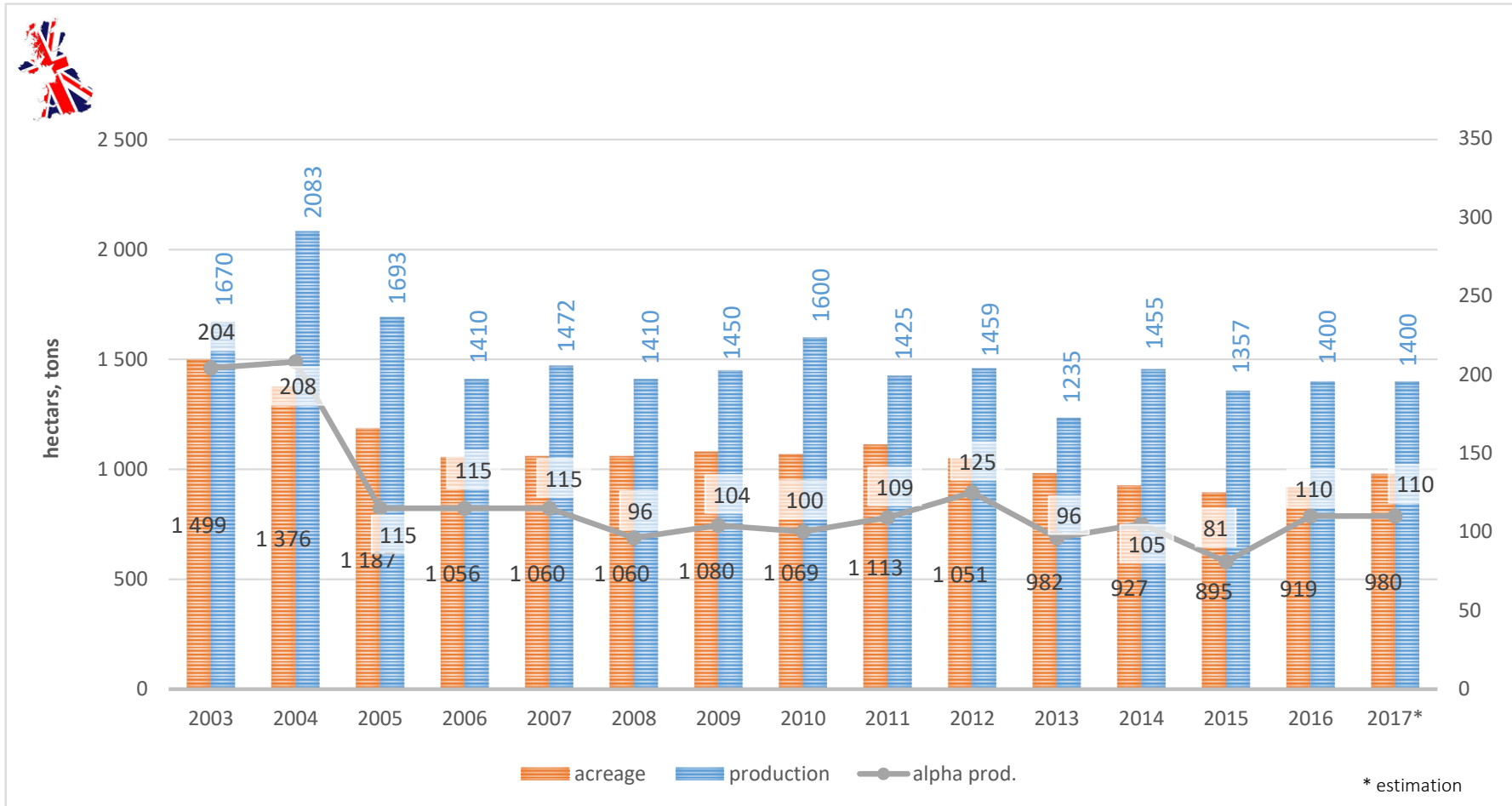


Figure 17: USA hop crops 2003 - 2017*

